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ABSTRACT

Research traced the flow of such events as faculty development, school district initiatives, state and federal policies, student experience, and systems changes in Montpelier (Vermont) High School over six years to identify patterns of activities that supported growing reform. To understand how community-based learning (CBL) for a few students laid the groundwork for what was to become personalized learning plans (PLPs) for all, students, teachers, and administrators were interviewed. The CBL effort began as faculty sought information on alternative programs to engage reluctant students and became a community vision that was validated by district policy in a strategic plan. The administration instituted a long-block schedule, and a mentoring program and CBL internship were established. CBL emerged in the form of a system-wide program for everyone. As paths of the activities converged, the CBL program expanded to include PLP. What makes the PLP program distinctive is its placement of the student's aspirations at the center of a quest: what is he or she doing here, and what is he or she learning and preparing himself or herself to do? The PLP conversation is sustained over the course of four years and dips into all aspects of the student's life. The four phases of the innovation at Montpelier were team and individual capacity building; shaping community vision; structural alignment and adaptation; and systemic resonance. (YLB)

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Growing Toward Systemic Change:

Developing Personal Learning Plans at Montpelier High School

In an era when lasting reform seems elusive to many, one school offers a glimpse into the messy process of growing a self-propelling program.

Carl and Nate are night and day. Nate is tall and fit, a respected member of classes and sports teams. Carl is small, shuffling through life with his head hanging just below shoulder line, eyes cast down. Nate is affable. Carl is hard to draw out in conversations or classes. Nate smiles. Carl smirks.

An enthusiastic and athletic twelfth-grade goalie for the Montpelier High School soccer team, Nate is not exactly the student teachers had in mind when the Community-Based Learning program first got started. They were thinking more of students like Carl, who has a tough time relating to classwork and doesn't get involved with after-school sports and activities. Yet both boys seem equally motivated by their off-campus learning programs. "I never thought I'd be doing this with my free time," says Nate, who reads to a small group, tutors one-on-one in math skills, helps plan group activities, and shares some of the responsibility of teaching in a first-grade classroom. "Who would have thought I'd be playing games and having fun with kids a third my age?"

And Carl isn't simply grateful to get away from school during the hours he spends assisting an elderly man who can't leave his home without major assistance. Even his Saturday mornings now include a home visit to his adopted grandparent, Charlie. "Some of my friends don't get it," says Carl. "They think I'm just wasting time sitting there quietly watching the clock. But Charlie needs me, you know — for food and medicine and stuff like that. Little things, but they matter."



Nate and Carl are just two of about 150 students — one third of the pupils at Montpelier High School — who now take part each year in community-based learning. It was success with a few students in the program's early days that built a foundation for the more systemic personal learning plan in place today. Now recognized nationally as "the Montpelier innovation," the program offers individualized educational plans for all students, rooted in self-directed inquiry and supported by the district at all levels.

When it began in 1992, the Community-Based Learning (CBL) program was originally intended for about 20 students who needed alternative learning options. But before the first year was over, 70 students had become involved. That figure has since risen, creating upward pressure for systemic change and leading to the development of the more comprehensive and inclusive Personal Learning Plan (PLP) program that has superseded it. In the coming years, Montpelier High School will expand personalized learning to include independent studies, individualized reading and writing courses, and off-campus community service and career explorations, creating a wide array of learning options for all students.

What does it take to move a traditional public high school and its system of lockstep classes within a conventional schedule into such an innovative structure? It is a process of learning for everyone involved.

Growing Systemic Change ---

In a large, complex setting like a high school, many different conditions and activities are simultaneously at work. Current faculty development, school district initiatives, and state and federal policies are just some of the forces that help shape the climate of a school. The student experience, along with systems changes like the introduction of block scheduling or transfers in leadership, also influence a school's capacity to function smoothly — and, thus, to maintain the status quo.

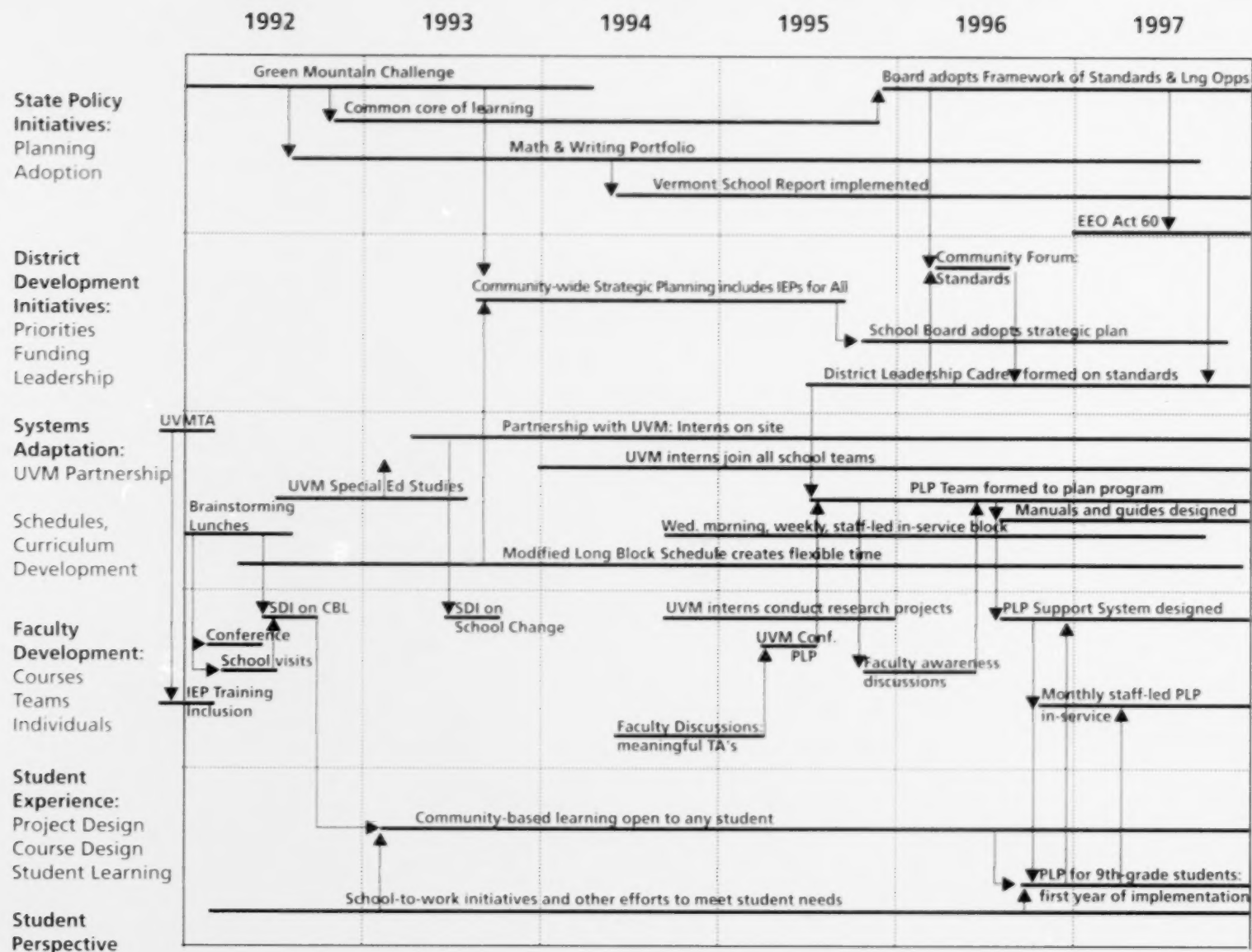
As researchers studying Montpelier's rippling changes, our strategy was to trace the flow of events across these organizational levels over a period of six years, searching for patterns of activities that supported growing reform. Our goal was to create a visible form for the invisible dynamics of change. Using graphic images to chart the district's fluctuations and innovations, we managed to create a kind of "moving picture" of the flow of energy inside Montpelier High School.

To get the full story of how community-based learning for a few students laid the groundwork for what was to eventually become personalized learning plans for all, we interviewed students, teachers, and administrators in the high school and district. Most had played a part in implementing either or both the CBL or PLP plans.

Figure 1 includes timelines of events that were regarded as influential by at least three people interviewed, with connecting arrows indicating the exchange of influence between any two events. To aid in analysis, the timelines have been separated into five levels, each representing one of the major spheres of influence in and around Montpelier High School. To ensure the accuracy of this representation, I double-checked drafts of Figure 1 with others at the school in a second round of interviews, adjusting times, events, people, and sources of influence to fit an emerging picture of the events connected during the period of the PLP program's development.

The resulting images were revealing. They showed that successful changes at Montpelier had actually survived and flourished in flashes of instability in the existing system, each of which created an "in" for further innovation. The implied lesson was that successful change occurs when unpredictable events suddenly connect and point toward an opportunity or problem typically ignored during the stresses and tumult of everyday work with students. As the commitment of a few had turned into a program for all, people at every level had provided feedback and guidance that increased their own capacity to carry out innovation in an expanding framework.

Figure 1: Simultaneous Timelines: Developing Personalized Learning Plans at Montpelier High School



Roots of the CBL program

The simultaneous timelines also illustrate how teachers at Montpelier High School have been developing their capacity for working with individual learning since the late 1980s. That was when the University of Vermont first became involved in the school's development, helping staff to implement inclusionary practices in special education; for this a well-known, individualized planning process was used. Special educators at the university were strong advocates for personalized learning plans for all, and as a result, Montpelier teachers developed increased awareness and use of individual planning. In response to this initiative, the high school regrouped its faculty for problem-solving and personal support for individual students across disciplines; teachers integrated school-to-work strategies with academic programs and learned to make good use of specialists in teams conducting case management.

In the years between 1992 and 1997, thanks to the experimentation of a caring faculty, community-based learning blossomed into a program requested by practically all students. The innovation grew by word of mouth, from student to student, parent to parent, and the business community to the community agencies. This healthy upward pressure steadily built for a system-wide change. What began as an effort to engage reluctant students percolated up into a community vision, then became validated by district policy in a strategic plan, and finally returned in the form of a system-wide program for everyone.

Connections beyond the classroom. During the first year, an informal faculty group began to meet over lunch, practicing what they had learned at a conference about team-led innovations. They employed a new team-brainstorming method that helped organize their explorations and led them to imagine program changes. The group included staff in varying roles, among them Cary, a guidance counselor; Nerissa and Owen, school-to-work specialists; Glenna, a special education and work counselor; Bill, a social studies teacher; and Phyllis, the school media specialist.

Cary recalls, "I remember a group of us getting together and talking about ways to make school more relevant, and that's when we developed the Mentor Program. We were trying to get adults in the community to mentor our students and trying to get them to help students see the relevance of what they were doing in school to the rest of the world."

At first, the team's desire to learn about alternative programs led them to seek outside information. Visits to other schools offered models. After considering the key issues for several months, the group decided that when students asked, "Why do I need to know this?" teachers at Montpelier High School should be able to show how learning connects to the world beyond their classrooms. Glenna counts the team's decision to focus on this aspect as a seed of the innovation.

In the same span of time, the administration instituted a modified, long-block class schedule that extended class periods from 43 to 80 minutes on two days each week. The newly emerging Mentor Program joined a growing number of similar efforts that could clearly benefit from longer blocks of time. These included school-to-work internships, a weekly late-start day devoted to professional development, a program called Jobs-for-Vermont-Graduates, service learning field trips in social studies, and natural resource planning studies in science. The new schedule also put subtle pressure on the role of faculty advising, which until then had been allotted only enough time for announcement-reading and attendance-taking. In retrospect, it became clear that early discussions about how to improve faculty advising and relationships with all students, aiming "to make better use" of the increased time, became an important factor in building the school's commitment to personalize learning for all students.

Planning an internship

The fact that Nate had some unscheduled time due to the school's new "long-block" structure of class periods led him to seek out a member of the school's CBL team. When he met with Bill Haines, a veteran social studies teacher and curriculum leader, Nate announced, "I'm interested in becoming a teacher, and I want to learn more about how schools work. What I can do?" Bill handed Nate an application form; plans for a CBL experience were accepted only after a lot of thought and effort were put into them. Then Bill contacted Lanie Nicholson at the elementary school, who said she would consider being Nate's site coordinator. Thus began a three-way dialogue with Nate about goals and expectations. When could Nate come to the class? How long would he stay? Did he have any experience with younger children? What did he hope to learn from the internship? Several students had worked at the elementary school over the previous six years, providing Nate with useful information and easing the way toward setting up the placement.

A CBL internship couldn't be fully established without a face-to-face conversation among the three main players: in this case, Nate, Bill and Mrs. Nicholson. Bill helped Nate to prepare. "We like to make sure the student knows that after the interview, he or she might decide against it, and that it's okay to change your mind. We want Nate to question his fit with the site just as Lanie is judging his fit to her classroom. So they can both still say yes or no. We build in a 'think-it-over' period of a few days just to make sure everyone feels positive and secure about the plan. These experiences are a long-term commitment."

At the interview, Nate was feeling good about his plan. "I was pretty sure about what I was going to say in the interview, but it was really different from what I expected," he recalls. "Because Mrs. Nicholson and Mr. Haines had some thoughts too, and that changed what I was thinking. I'm glad I didn't have to decide right then, because I might have said no just out of fear of the unknown. I mean, how could I know ahead of time what I would think of as *success*?"

Together Nate, Bill, and Lanie settled on the timing and sequence of the primary facets of Nate's CBL plan: experience, reflection, and evaluation (See Figure 2). They shared the plan with Nate's parents, who, along with the key partners, signed off on an agreement to help Nate succeed.

"Goals and assessment are the hardest things," says Bill Haines, "because even traditionally successful students like Nate just haven't had many opportunities to plan learning experiences, to think about their goals, and to actually write things down which they will be held accountable for. Hopefully, as personal learning takes hold throughout the system, K-12, we'll see students who have done this sort of thing a few times, who know themselves better, and who have tried out their wings long before their senior year."

Paths converging

The intensified faculty interest in making learning relevant filled the city with students and teachers exploring experiential placements. "The MHS teachers," says Nerissa, "were all bumping into each other and crossing paths downtown while trying to make placements."

Glenna remembers the resulting desire for a cohesive plan. "With mentoring beginning, we looked at all these other small programs at the high school, and we saw that all of them had some community resources," she says. "This started people thinking about how things might be coordinated." At this point the school principal, also a member of the team, helped support a team-planning event facilitated by the University of Vermont. It was during this summer experience that the Community-Based Learning program was born, with the formal goal of bringing order to the urge to involve students in active learning.

Individual learning by teachers also played a role in the growth of the innovation. During the same time the summer session was being developed, Glenna began taking an administration course at the university. As part of the

Figure 2: Steps in the Development and Completion of a Community-Based Learning (CBL) Experience

Initial Idea

- Expression of interest by either a student or community member
- Application form for student planning
- Site development for a community organization

Development

- School supervisor either directly acts on community contacts or seeks assistance from the CBL team to develop community connections
- Placement possibility is found
- Interview with a site supervisor: student and school supervisor are present; student explores what he or she wants; site contact states expectations; a "think-it-over" period follows
- Student and school supervisor continue to work on a CBL contract and statement of learning opportunities and goals
- Decision is made
- Coordinator is recontacted to determine final arrangements and schedules

Experience

- Two to three weeks later, school supervisor makes contact with site coordinator to "see how it's going"
- School supervisor visits site

Assessment of Learning

- As the marking quarter draws near, about eight weeks into the CBL, the student and site director assess the CBL using an evaluation form based on Vermont's Framework of Standards
- A "pass/fail" mark is determined by the CBL team



class, she wrote a "Systems Change Plan," designed to coordinate business, community, and educational partnerships at Montpelier High School. Her one-year plan became a report to the school board and helped define and focus the issues around the continuum of student services and the need for coordination between the school and the community.

Then in 1993, from the base established by special education grants and consultation, a professional development school (PDS) was incorporated at Montpelier High School. Part of a rising trend in teacher training and professional development of veteran educators, PDSs can be likened to teaching hospitals, in that they are intended to be centers of learning for those entering the field and also places where experienced practitioners can share their knowledge while being enriched by current research and theory.

In Montpelier, this development brought a cadre of interns in teaching, counseling, and social work to the school to earn licenses — a good match for such an innovating culture. As with the personal learning plan program, the professional development school was invented step by step. Year-long and semester-based programs were developed, through which interns experienced the work lives of teachers and followed the calendar of the high school rather than that of the university.

Advised and monitored by a team of teachers and administrators, the interns encountered a diversity of ideas about practically every aspect of the school. They were involved from the beginning in all of the ongoing committee work, placing them at the heart of decision-making about new structures and programs like the learning plans. Research projects, required in their coursework, often helped to fill out or extend the action research projects of the experienced school staff. In this way, university faculty came to serve as informal advisors on all aspects of school change for both the interns and the school staff.

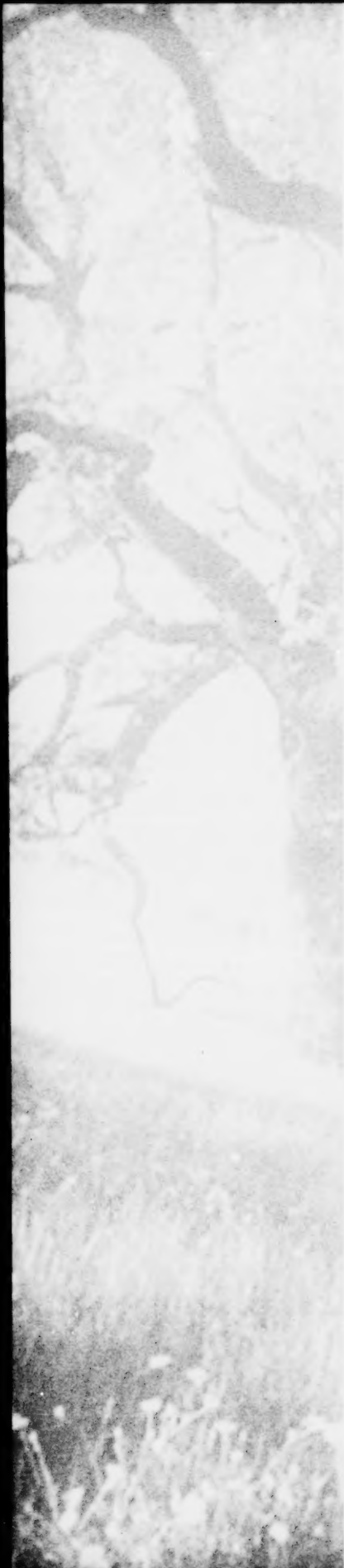
Emergence of a new plan

District-wide strategic planning began in 1993, providing students, faculty, and community members with a comprehensive framework for new ideas. The advent of new state standards and assessments, together with the still-new central office administration, led to a good opportunity for the community to reconsider its vision for education. "You are cordially invited to attend an evening session to discuss the future of the schools..." began a letter from Superintendent Brian O'Regan at the start of that school year, and more than 200 people showed up.

Most continued to attend for four months of evening study and planning sessions. People were divided into nine "action-planning" teams, one for each of the major goals identified during a strategic planning summit with representatives of the community. Readings and discussions, arguments, agreements, and cost-to-benefit ratios fed the imaginations of the designers. Teams of lay people then stood in front of their community peers to present and defend their plans. From this process a five-year plan coalesced, bringing with it abundant energy and a high set of expectations from parents, students, and community leaders.

In the midst of celebrating the plan's completion, many commented that nearly half the long-term actions in the final document supported personal learning. The focus on individualized learning was a remarkable commitment, but perhaps not a surprising one — given that many students like Nate and Carl, and their parents, were also the late-night designers of the long-range plan.

The blueprint asked that the school system provide sustained adult attention — a "navigator" — for each student, to assist with efforts to fulfill his or her aspirations and potential. The community designers also envisioned a coordinated K-12 program for personal planning and community learning opportunities. In this way, a new concept was born, at first dubbed "IEPs for all students" — borrowed from special education's "individualized educational plans" — but soon to be renamed "personal learning plans."



Expanding team, expanding program

During the first years of the strategic plan that began in 1994, the school district turned attention to high-priority needs for teachers. These included developing standards, establishing a leadership team in standards-based teaching, and building the staff's assessment skills and its ability to work in a system oriented toward improved student results.

Meanwhile, the community-based learning team at the high school kept working, offering hundreds of students off-campus learning opportunities. A new planning group formed to consider how to move forward with the personal learning plans. Its members, the PLP planners, attended a conference sponsored by the University of Vermont, the school's ever-present partner, at which other schools showed how they were researching and developing variations on the theme of personal learning. This spurred CBL and PLP team members to form a nucleus which began to develop a vision of expanded possibilities.

A year later, in 1995, a larger team was formed. The PLP organizational team, which included students and community members as well as school staff, arose to carry the possibilities forward or, in the words of Owen, the group's facilitator and cheerleader, to "plan and reorient the journey." While the CBL team continued to help students with off-campus learning, the new PLP team was given status as a standing organizational committee of the school, on a par with groups handling curriculum and operations. As such, Owen became a member of the school's management team, occupying the same level as a curriculum area director. This legitimized the effort as a major program of the school. After more than a year of PLP design efforts, introductory sessions, and long open discussions by the staff, a whole-school program emerged.

Need for protocol

To stabilize the emergent innovation, the PLP organizational team published materials articulating the purposes, processes, and training issues which they had either invented or gathered as data from full staff meetings. More importantly, they designed and built the support structure for the program — policies and procedures for the use of time, arrangements of faculty into paired support teams, and development of multi-aged student advisory groups — which still sustains the innovation. According to Owen, the reasons for the plan's success are clear. "Staff members became champions of the initiative," he says. "Everyone in the group took on a leadership role at some level." Each month the PLP organizational team trained the full staff, and its members created a manual that would be used for future staff communications.

During 1996 and 1997, extended weekly and monthly conversations took place between the PLP organizational team and the faculty as a whole. The team continued to carry out its roles as the faculty's self-selected leadership group and as the design team for the personalized learning plans. With each interaction between team and faculty, energy and momentum grew, and the program design became increasingly fine-tuned to the strengths, interests, and needs of the faculty — a living model of the very process desired between students and teachers.

Give and take

By this point, the benefits of sending students out into the workplaces of the community had become clear.

When he first entered the elementary school to begin his internship, Nate felt a bit uneasy. He recalls wondering: "Am I ready for this? What am I going to do here? What have I got to offer?"



The classroom teacher, Mrs. Nichols, introduced him to the first-graders. "Children, this is Nate, who was a student in this school," she said. "How many years ago, Nate?"

"Let's see. Probably six or seven," Nate mumbled, red-faced.

Giggling, shrugs — and wide-eyed faces that showed these youngsters couldn't believe that from their little bodies such a big person could grow. Nate had expected to be a "big brother" for one student, but soon all of the children requested him as a tutor. The children, too, had much to offer. They "adopted" him and made him feel that he was an essential part of their lives.

Three weeks into Nate's internship, his advisor, Bill Haines, took time out of his regular teaching schedule to visit the elementary school. In one first-grade classroom, Nate juggled wool hats off the rack and tossed them, frisbee-style, onto the heads of the children standing in line for recess. Later, he morphed into a careful storyteller for the enthralled group of youngsters.

"I'll never forget how the kids hung onto Nate. He was so big, sitting in those tiny chairs, reading the story. And you could tell he loved the attention. I think it reminded him that he used to be a big brother to a little one, too," says Bill, noting that Nate's sister Liz would be entering Montpelier High School the following year.

Within the month, Nate brought to the high school a sense of excitement that attracted others to working at the elementary school. By the end of his first semester, six fellow soccer team members had found their ways into the little ones' classrooms. Some helping at recess, some helping at reading, all found ways to give of themselves.

In return, the teens had something tangible to show for their enjoyable work — passing grades in self-directed electives, an array of evidence showing important growth in personal communications skills, and journal entries that included reflections about teaching in the future. These students had also documented many work-related competencies: arriving on time, taking initiative, showing responsibility, and performing careful work.



Such varied learning experiences are at the heart of community-based learning, explains Glenna Copeland, who helped design the program. "When students without community-based learning experience walk downtown to and from school, they look at buildings and do not know what goes on inside," she explains. "Their learning is at the school, in a separate building. With internships, students are put into the buildings. They learn what makes a community and they gain an increased sense of belonging."

Moreover, the students must be interviewed, write weekly reactions to the experience in journals, and meet regularly as a group. Says Glenna: "They learn how to sell and pitch for themselves. They go somewhere. They learn about who they are."

A different kind of success

Inasmuch as the structure of community-based learning reflects the structure of any self-directed learning experience, it is not so much a separate program as an integrating process. It helps to tie Nate's learning experiences together for him around his interests. Further, academic subjects such as writing, math, and science can all become visibly part of his experiences within the community. When he works one-on-one helping a child to understand a fraction, for example, he practices and solidifies in his own mind why dividing by zero is not just "against the rules" in algebra. Through an opportunity to lead the youngsters' daily science lesson, he becomes, for a time, an expert, a planner, and a communicator. In preparing his folio and documentation for evaluation, Nate writes from both academic and personal points of view as he attempts to answer the questions "What did I learn?" and "What did the experience mean to me?"

As part of Nate's final reflection, Haines and Mrs. Nicholson join him at a public "roundtable," where they talk about how the program worked for everyone involved. Nate rates himself on key standards related to his internship, completing both limited and open-ended responses on the assessment



form shown in Figure 3, and then writes about his experience. Lanie discusses the ratings and participates in the assessment. Depending upon which he had selected at the outset, Nate may now receive either academic credit or recognition points for a school community service award for his permanent record.

Other questions help round out the picture of what has occurred. Would Nate recommend the experience to other students? Would the supervisor take another student in the future? Did the planning design and support work? Improved communications and problem-solving abilities — identified as vital student results in Vermont's Framework of Standards and Learning Opportunities — are integral to success in community-based learning.

Looking back, Nate has found value in his elementary school experience from many perspectives. "The whole class surprised me on my last day," he said. "They had found out a whole lot about me. They did a 'This is Your Life' skit that was too much! I was supposed to be done after that, but I just keep going back to see how they are doing, you know. And they keep writing me, so I stay in touch. It's amazing how much they have changed since I first got there."

Clearly, it is not only "they" who have changed in six short weeks, and growth can be measured in such moments. Nate's insight — in a moment during which he might have been too busy and "successful" to notice in his traditional schedule — is that he needs others.

He explains: "I thought I was going to help them, but they taught me more."

Figure 3: CBL Assessment Rubric

Student _____ Date _____
 Community Supervisor _____
 Learning Site _____

To the student: Please rate yourself on the following criteria and provide additional comments below.
 Tell what you will do to continue to improve in this area.

To the community supervisor: Please compare your ratings with the student's on the following criteria,
 then have a talk with the student about both positive and negative differences.

Rating: 1= Never, 2= Seldom, 3= Some, 4= Usually, 5= Always

						Student Rating					Supervisor Rating				
Communication															
1	Listens attentively for directions					1	2	3	4	5	1	2	3	4	5
2	Seeks new information when needed					1	2	3	4	5	1	2	3	4	5
3	Makes needs and concerns known; states opinions					1	2	3	4	5	1	2	3	4	5
4	Uses appropriate language					1	2	3	4	5	1	2	3	4	5
Problem Solving															
1	Shows initiative, openness, & persistence in solving problems					1	2	3	4	5	1	2	3	4	5
2	Asks questions to clarify and help with finding solutions					1	2	3	4	5	1	2	3	4	5
3	Chooses and uses effective problem-solving methods					1	2	3	4	5	1	2	3	4	5
4	Can apply math, writing, and creative approaches as needed					1	2	3	4	5	1	2	3	4	5
Personal Development															
1	Accepts constructive criticism					1	2	3	4	5	1	2	3	4	5
2	Maintains a positive attitude					1	2	3	4	5	1	2	3	4	5
3	Makes healthy choices					1	2	3	4	5	1	2	3	4	5
4	Develops productive relationships					1	2	3	4	5	1	2	3	4	5
5	Demonstrates dependability and productivity					1	2	3	4	5	1	2	3	4	5
Social Responsibility															
1	Maintains acceptable attendance record					1	2	3	4	5	1	2	3	4	5
2	Respects the rights of others and appreciates their roles					1	2	3	4	5	1	2	3	4	5
3	Works cooperatively with co-workers					1	2	3	4	5	1	2	3	4	5
4	Uses safe workplace procedures					1	2	3	4	5	1	2	3	4	5



Personalized Learning for All

Like many others who experienced the Community-Based Learning program in its early days, Nate and Carl have graduated and are now pursuing higher education or work. But not all of their high school peers had the energy, time, or opportunity to pursue learning outside of school. This is a primary reason for applying the practical lessons of the CBL plan to development of the Personalized Learning Plan program, an innovation with a focus and reach that are decidedly broader.

Asking tough questions

As a ninth-grader, Nate's sister Liz is already involved with the PLP program. Though she is not yet ready for learning in the community, she has already taken part in two parent conferences and several meetings at school about her personal plans. To meetings like these, Liz brings drafts and sketches of her ideas. She has a neighbor who is a surgeon. As she has done babysitting for his children for years, she has spoken with him extensively and even been invited to visit him during his work at the hospital. Through the PLP process, Liz has begun a supportive, sustained dialogue about how she can build on her interest in learning about medicine. Already, in just the first few months of her high school career, Liz is better known and perhaps better understood by key adults in school than is her sports-star brother Nate — and her story is just beginning.

What makes the PLP program distinctive is that it places Liz's personal aspirations at the center of a quest. *What is she doing here, and what is she learning and preparing herself to do?* PLP development is not merely a beefed-up advising program, nor is it a single-event, community-based learning experience. Rather, it represents the beginning of a four-year conversation between Liz and her teachers about her hopes and dreams for the future. This conversation will aid in the creation of a personal folio in which to keep her reflections about her purpose and her learning. And it will provide Liz with access to caring adults who will help her to navigate her way.

Synthesizing experience

Because the PLP conversation is sustained over the course of four years and dips into all aspects of Liz's life, the program differs significantly from single-event designs like the community-based learning experience. Liz meets her advisor daily for a brief check-in, along with a cadre of fifteen friends she will get to know well over the next four years; each year, four twelfth-graders in her advising group will graduate and four ninth-graders will be added. Next year Liz will help to mentor the newcomers.

Liz's PLP group meets weekly for an extended period, giving her time to work on her plan. Other group members help her prepare for parent conferences, give her new perspectives on her activities, and assist her in solving problems as they arise. Once a month, the group has a significantly longer block of time, if needed, to go somewhere together, play a game, hold meetings with parents, or to be creative. Liz's advisor has built in several periods during the week to work with other teachers on advising issues, ask for and give personal support, and converse about next steps in her own plan.

According to Owen Bradley, who directs the Personal Learning Plan program, individualized learning can now provide *all* students with a wide range of ways to show that they have met Vermont's educational standards. "Students learn to synthesize their learning," he says. "They learn how to perform. They learn application, not theory by itself."

Indeed, a student in this program may manage a radio station, design a course of independent study, produce public service announcements, decide on courses for the following year, file documents, and learn to stitch five different sutures. How are such things connected? According to school staff, it all comes back to students like Liz developing a deep desire for learning. The PLP program connects students to all of their classes and experiences, wherever they may go. It encourages more applied learning in the high school curriculum, and it provides a personal context for learning core academic subjects and skills.

As an umbrella plan, the personal learning program shelters and brings together a number of pre-existing program efforts that were previously uncoordinated. In sync with the strategic goals of the community, the process helps all students raise the most important question an individual can answer: *What am I doing here?* Liz's answer, as it arises in her plans via dialogues with friends and advisors over the course of years, is flexible yet clear. Her plan is team-supported, built around her own interests and ambitions, and nourished by a group of people who help her gain from personal learning experiences in the classroom and in the community.

Phases of Change at Montpelier

As shown, "the Montpelier innovation" came about as a team coalesced for the benefit of one group of students, enlarged its vision to accommodate all students, and sent a wave of influence into district policy. This activity then returned to the school as a system-wide commitment to offer opportunity to all students.

In general, what can be said about the underlying dynamics that fueled the motion from school to community and back to school again? The movement toward personal learning plans seems to have been built and sustained by at least three simple, yet powerful, principles:

- asking individuals and groups what they are good at, what interests them, and where they want to go with their lives
- responding with creative openness to all possibilities for learning and developing plans that allow individuals and groups to pursue their dreams
- sharing and providing resources that can help individuals and groups achieve their goals

These three principles describe the motivating forces of all the interactions within the system — between students and adults in the personal learning plan program, between a committed school team and the adminis-

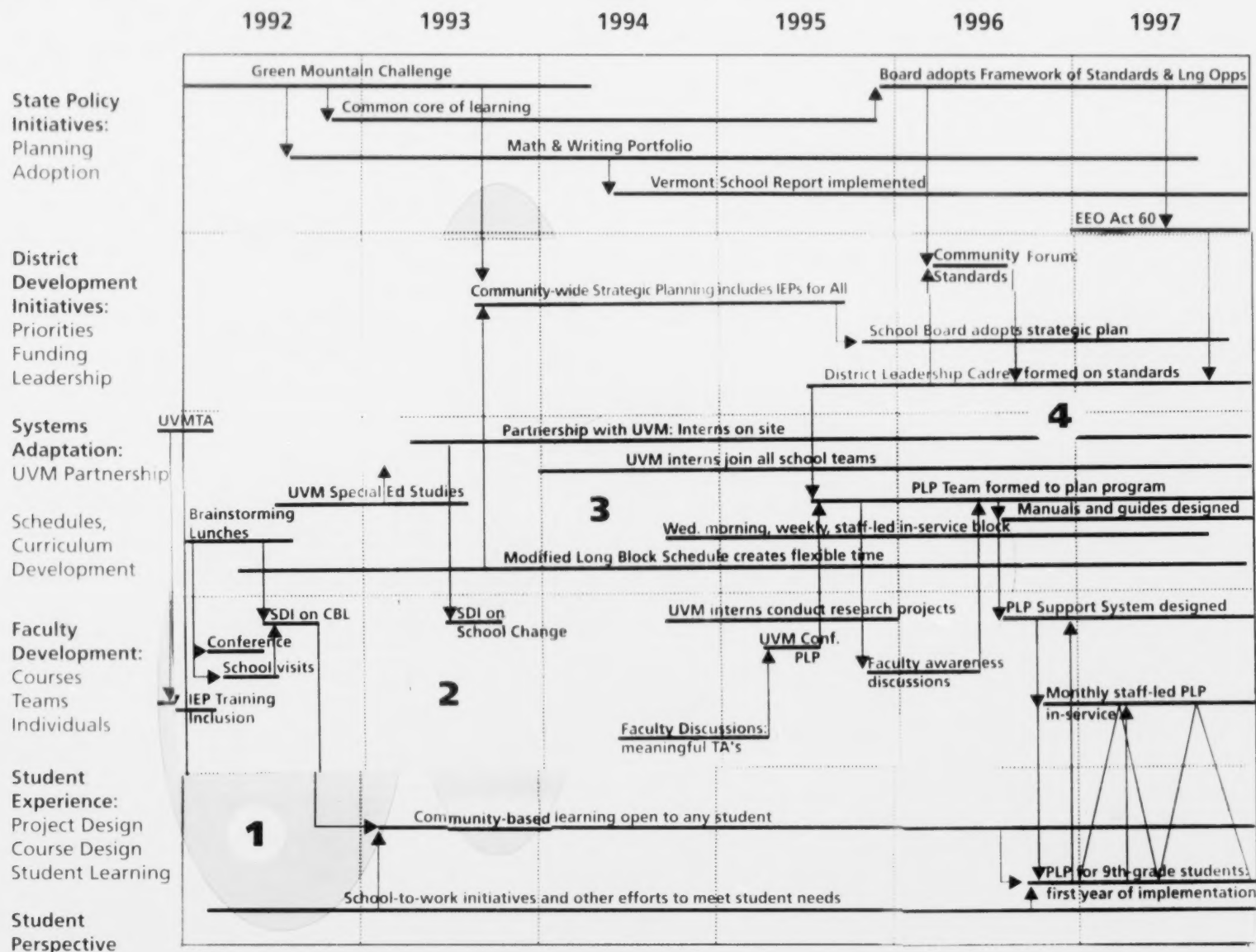
tration of the district, and between the district leadership and the community. The principles fueled the formation of self-organizing patterns which then became capable of sustaining change, and their repeated application at every level of the system helped give rise to the four phases of change we see in the timeline (See Figure 4). The following paragraphs summarize the four phases of the innovation at Montpelier High School and then describe a few key conditions that were essential to the success of each phase.

Phase 1: Building team and individual capacity

The first phase in the history of Montpelier's movement toward personal learning plans was the "bottom-up" creation of local capacity in an enriched environment full of energy, experimentation, and faculty learning. Faculty leadership emerged in this phase, remaining active throughout six years of development. Owen Bradley and Bill Haines reflect some of the diversity of Montpelier's faculty leaders: The first exudes the fervor of a new leader, fueled by a commitment to reach every underserved student with new opportunities for learning, while the latter brings a quieter level of thought to the dialogue and a more circumspect approach to action. For well over twenty-five years, Bill has been "doing things a little differently" every year. He extends ideas carefully to others, saying, "Here's what I've been finding helpful." In addition, he takes into consideration the stance of teachers who resist change, the ones most likely to ask what the teacher's union thinks about an innovation's impact on the Negotiated Agreement.

An established culture of inclusion and experimentation provided a foundation for the early, "bottom-up" phase of the innovation process, guided by the administrative staff, university helpers, and faculty at the center. During this early stage, several independent faculty initiatives allowed a significant number of students like Nate and Carl to leave the building to learn in their community, both giving to and learning from it. The growth of an inclusive culture sparked entrepreneurial faculty subgroups to extend service-oriented opportunities to more and more students, resulting in

Figure 4: Simultaneous Timelines: Developing Personalized Learning Plans at Montpelier High School



crowds at the doors of community businesses and agencies where students wished to volunteer. The flow of students into the community started a chain of structural adaptations within the school, aiming to coordinate resources, purposes, and approaches. The Community-Based Learning program was born, enabled by extended block scheduling that allowed Nate and Carl longer blocks of time to get out into the world and back to school as necessary.

The following circumstances supported bottom-up change.

- A culture of experimentation and innovation grew; administrators listened and were responsive to the staff; many took risks.
- Informal problem-solving groups took effective action.
- Structural changes opened new possibilities for everyone.
- Individuals developed a sustained commitment to personal achievement.

In addition, Montpelier, unlike most Vermont communities, does not rely on buses for transportation. The entire community is within walking distance of the school. Not having to overcome geographic constraints eliminated a significant barrier to the development of personal learning plans.

Phase 2: Shaping community vision

In the following "top-down" phase of PLP development, the faculty innovations and discussions became institutionalized by the community and school board. Accumulated years of community experience with students coming and going in Montpelier businesses, schools, and homes guided the strategic planning process by providing concrete examples of a complex idea. The Community-Based Learning program showed how a broader program could look and work. Nearly half the long-range plan, designed with input from hundreds of people, seemed to call for "more of what the Community-Based Learning program was doing." The existence of the successful model reduced resistance to the novelty of the ideas being discussed. But a particularly critical factor was that when the mandates of the plan became evident,



teachers were not pressured to implement the plan immediately. In the phase that followed the shaping of the community's vision, faculty leaders were developed in groups that held the controls of implementation. These groups were able to follow a flexible timetable of their own design.

The following conditions and situations supported top-down change.

- A small but diverse group, representative of the community, constructed a vision, a mission, and a set of broad strategies, then invited others into a sustained critical dialogue.
- The theme of student involvement was developed into specific actions, with broad and diverse engagement in the study and design of agreements.
- The key theme was supported by several strategies, ensuring that it would be addressed within a broad, integrating approach.

Also, the state's emphasis on increased strategic planning by broad stakeholder groups may have influenced the superintendent's decision to try a similar approach with the community, for two reasons. First, the Montpelier district sits in the state capital, and many parents of the high school students are also state leaders in public education, higher education, and social services. Second, the district leadership engaged in a highly interactive policy discourse with "the state" on a continuous basis (Hasazi, 1994). The broader public in Montpelier got involved in building a vision and engaged in the hard work of long-term planning because some members of the community recognized and understood strategic thinking.

Phase 3: Structural alignment and adaptation

During the third phase of PLP development, the faculty and administration developed support structures linking the vision derived from community involvement with the early program models such as community-based learning. This development process shared features with the earlier models, but the idea of personalized learning now permeated the whole school and much of the community, creating resonance among disparate aspects of a

general reform. Open support for experimentation was expressed at faculty meetings, and many people spoke of the value of the school's growing commitment to provide excellence in learning for all students.

A creative, informal team gathered to solidify procedures and guidelines — this time backed by the strategic plan, as the team had a mandate from the whole community. Individuals and teams could now plan without seeking authority from external sources. "Planning-with-leadership-responsibilities," augmented by weekly meetings, allows a staff and faculty to lead themselves into the future. In Montpelier, a diverse group of staff members — faculty like Bill, school-to-work specialists like Nerissa and Owen, guidance counselors like Cary, media and library staff like Phyllis — along with students like Nate, Carl, and Liz, studied the issues, then led the rest of the faculty in exploratory design sessions where problems came to light and solutions were developed.

Team members were confident that the school system would eventually need to address the personal learning aspects of the long-range plan, and they trusted that their ideas would eventually be heard. Supportive administrators, while juggling other priorities, urged them on and found time and money for implementation. Research studies by interns from the University of Vermont, who were also members of school development teams, kept helpful information flowing to the design team.

The following situations supported alignment and adaptation.

- A "bottom-up" leadership team designed and led school-level planning.
- All faculty engaged in the design and adjustments of the plan, and they set the timeline for implementation.
- Community partnerships increased the research and planning capacity of teams.
- A common language developed through faculty discussions.

Phase 4: Systemic resonance

During the final phase of the system change, personal learning became available to all students, and it was maintained by an ongoing conversation at every level of the organization. To prepare and support the faculty, university partners offered new perspectives and models, working side by side with school-based educators. Intensive faculty involvement over a full year of planning led to a multi-leveled approach to implementation which is still moving forward. At the same time, weekly faculty meetings and in-service training sessions led by staff members focused on the types of teaching techniques that would allow personalized learning to thrive at Montpelier. As faculty became involved in individualized planning, particularly through teacher advisories, they needed time to discuss the kinds of problems that arise with such an approach and to share solutions that fit a variety of challenges. A continuous feedback cycle, rejuvenated each month with new discussions, gave the leadership team information they could use to make adjustments. The ongoing dialogue across organizational levels influenced the evolution of support systems and gradually delineated the future of the program.

The following represent the key conditions under which systemic resonance occurred.

- Innovation was led by faculty.
- There was a benefit to all participants: students, teachers, parents, and community members.
- Time within the teaching week was dedicated to faculty discussions of problems and solutions in daily work with students.
- A model of continuous improvement guided action and reflection.

Incremental Expansion

What the Montpelier story demonstrates is that resonance in relationships in one part of the system can stimulate positive, sustainable changes in another part of the system (See Figure 5). When Liz announces that she wants to be a surgeon, and she has already spent time observing doctors in an operating room, she presents her adult mentors with a new set of challenges. That is, how can her teachers impart knowledge, skills, and abilities relevant to her growing commitment? When her teacher Bill Haines asserts that his strengths lie in "making things happen," he presents a challenge to the teachers' union, the school board, and the superintendent: How can the administration find ways to creatively accommodate his leadership goals, thereby allowing him to fulfill his own ambition while enhancing organizational efforts at the high school? Similarly, when members of an entire school and its surrounding community say they are willing to place personal learning at the center of education, their commitment may influence state and national educational bureaucracies.

Figure 5:
Pattern of Energy Flow at Montpelier High School, 1992-1997
Growing Systemic Change





Though it is no easy task to build a personalized curriculum in today's policy-laden environment, we can learn from this story where change began with a student voice. When a pupil like Liz asks *What am I doing here?* we need to know that she wants to propose her own answers to that question, whether or not the larger system is attentive or responsive. And if we listen and respond, a new energy source for school reform can be triggered by our response, *What are you personally planning to do?* When a student hears a respected adult say that her dream of being a surgeon is possible, she develops faith that her energies and interests might find a vehicle. But beyond encouragement, she needs external resources as well as words to help with her preparations — a teacher who will show her how algebra is used to model the resource use of blood in a hospital emergency room, a history teacher who will guide her to the first anatomy book ever printed in English, an art teacher that develops her medical illustration and graphic representation skills. Whether she eventually settles on medicine, mathematics, or art, the student needs steady support as she finds her own way.

The same attentiveness and responsiveness is needed by her teacher Bill. The intrinsic rewards of teaching are, for many teachers, what move them through their daily challenges. But they, too, need external support at key times, particularly if they are developing an idea that can improve a school. Faced with barriers and lack of appreciation, any good spirit is likely to tire. Luckily for Bill, and for the system where he taught, he received part of the recognition and a few of the resources he needed to work with community-based learning until personal learning plans were ready to be born.

The notion of providing learning opportunities for all students, based on a personal learning plan, has not reached the level of a state initiative. Essex and Mount Abraham high schools in Vermont have expressed interest in testing the fit between their ongoing reform efforts and personal learning plans. If the innovation does spill over the local boundary of Montpelier schools and become a sustained innovation in other systems, it would likely occur within a pattern similar to the one shown in Figure 5. Bottom-up pilot



sites for variants of “personal learning and social responsibility” will be encouraged and watched.

When the pilots look promising, top-down policy will then attempt to validate the good practices, encouraging their spread to other local school systems. Measures of the policy’s success, as others have reported in policy implementation (Fuhrman, Clune, & Elmore, 1991), will reflect the degree to which local systems have developed the capacity to enter into the conversation with self-selected leadership and bottom-up adaptations of the policy.

Growing Forward—————

The last phase of Montpelier’s innovation — where there are mutual benefits and a balanced exchange at all levels of the organization — reveals what might be called systemic resonance. In the same way that a vibrating string can be brought into accord with another, a vision that lets individuals understand how their own efforts resonate with the whole sets the key for a school-wide change. When time for communication is available, resonance can occur across any boundary in Figure 5 — between Nate and Carl, between Liz and her teacher Bill, between Bill and the superintendent, and between the superintendent and the state board of education. If the interactions across boundaries produce mutual benefits, their resonance will increase the prospects for further growth and development within other parts of a school.

Personal learning plans created a general format for the whole school community to use to resonate and amplify their separate efforts. Students thinking about their lives inside and outside of school, and parents thinking about their work lives and home lives, could all benefit from helping each other to clarify visions, set direction, and take action. Teachers developing themselves as leaders and as life-long learners, interacting with school and community leaders reflecting on where they are taking their organizations, could also benefit from mutually beneficial relationships. It seems clear that



even government officials could use the central vision behind a local innovation to take stock of state policies and to adapt with creative openness to the learning patterns of the communities they serve.

The boundaries separating members of the educational system — learners, teachers, parents, and community members — can easily suppress change. However, when a common vision supports systemic resonance, the boundaries flex and allow people to come into dialogue and synchronize in unexpected ways. When the community-based learning team continued working year after year, its positive effects attracted more and more people to take notice. The team's method, which was to link individual interests to new places for learning and support it in new ways, was readily transferable to learning for all students through the personal learning plan. The same process can also be extended to adult learning for other members of the school community — through individual professional development plans, school-wide strategic planning, and action planning processes. The difference in age and knowledge between Liz and her teacher Bill is great, but Liz knows more than Bill does about medicine. Because he is much older than she is, he can help her to set a realizable path toward the future. In harmony at different ends of the keyboard, both may be pleasantly surprised to learn something new about themselves in dialogue with one another.

These days, the faculty at Montpelier High School set aside two of their weekly staff development meetings each year to hear students and community members tell what personal learning experiences have meant for them. Videotapes of Carl working with Charlie and of end-of-year presentations are later shown to parents and teachers to promote awareness and understanding of the program. Those who have undertaken such experiences receive special recognition at awards ceremonies for their achievements. It is then, perhaps for the first time, that struggling students appear on the same stage as their academically successful peers. Both are lauded for their accomplishments in learning and serving, giving shape and substance to the abstract idea of self-directed learning.

If the Montpelier story had stopped with one strong interaction between a student and a teacher, or even among a few of them, it would be a heart-warming thing, but would it merit study? Not if it remained confined to a small region of the larger system. But we are fortunate that Montpelier's innovation spilled over several boundaries and became locally systemic. In this example of positive systemic change, success breeds success, not only for those directly involved but for all members of the school. It shows that regardless of where mutually beneficial interactions take place in a system, they can generate patterns that organize and lead to positive systemic change, influencing behavior at all levels. This is what we need to have more often if we want to see learner-centered change reverberating from students to the state houses.

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